Reminder

PENTALOGIC

ACME selects Pentalogic's SharePoint Reminder WebPart to enhance SharePoint based Practice Support Job Tracking System

NOTE - This Case study was first published in 2009 with the full agreement of the customer. In 2016 they asked us to remove identifying details from this case study due to staff chagnes.

Attempting to start a new business within a business is a daunting task. Attempting to automate the management and operation of that business can be even more daunting. Attempting to do it in a short period of time, in a comprehensive manner, and building in sophisticated, automatic management notification and reminder features can be impossible.

Impossible, that is, without the use of advanced software plug-ins such as **Pentalogic's SharePoint Reminder Web Part.**

In June of 2009, ACME decided to develop a full-scale in-house litigation support department. Mr W.P. the new director of Practice Support was recruited to begin building the standards, processes, procedures, staff, and services to offer a variety of litigation support services to the firms attorneys. As one of the country's leading product liability firms, they quickly saw the potential of reducing costs to its clients by making these services available in-house.

> " *We needed features similar to Microsoft's Outlook Reminders* "

What started as a staff of two, quickly developed into a staff of seven experienced litigation support professionals. W.P. knew that keeping track of incoming requests and ensuring that critical deadlines are met was key to the success of the new Practice Support Department. He needed a system to track jobs, productions, specifications, knowledge gathered, share common
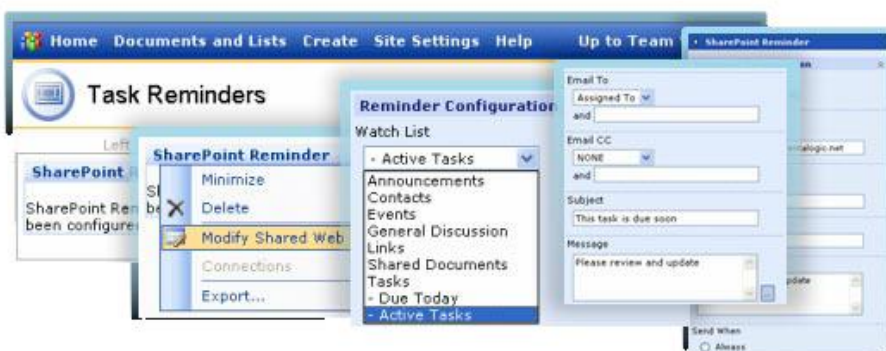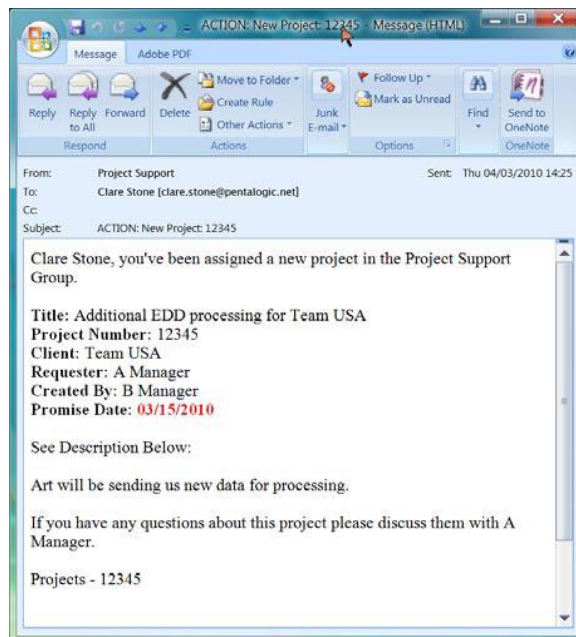
documents, and keep up with the pulse of a fast moving target. Anyone who knows litigation support will attest to the need to stay on top of fast-moving deadlines and tracking detailed information about each request coming into the department.

> *The flexibility is really remarkable. I've worked with a lot of third-party SharePoint Web parts and I have to say Pentalogic's Reminder is one of the best I've seen.*

Having previously developed an ITIL Change Management system with SharePoint, W.P. felt confident SharePoint was the right platform to build the information management system needed. A basic system was up and running in less than a week and over the next six months it was refined with additional enhancements to make the department operate efficiently.

Since the Practice Support SharePoint site already contained a list of projects, with fields for project lead, promise date, and competed date; it was a simple matter to add three Reminder web parts to the home page. Each web part controls the alerting feature of – New projects; Projects past their promise date; and Completed projects. The web parts are hidden from view of the user, but operate in the background monitoring information fed into the system.

For example, when a new job is created, the Reminder web part automatically detects this (once an hour) and sends an email notification to the person assigned to the project. Pentalogic's web part even has the ability to customize the reminder email message with fields from the SharePoint list, so a new project email might read like this:

The logic capability in Pentalogic's Reminder web part is extensive and can check dates, check creation of an item, monitor other fields, and even re-set the reminder if a change occurs (for instance, if a project is re-assigned to a new staff person, another email notification is sent, even though that project was already created).

Notifications for projects past their promise date and completed projects operate in the same manner. In addition, a cc: email can be sent to another user (i.e., in our case, for all new projects

> *Staff are sent alerts on critical deadlines and follow-up on completed projects can easily be done.*

[no matter who creates them] a cc: of the notification email is sent to the Director*). "The flexibility is really remarkable. I've worked with a lot of third-party SharePoint Web Parts and I have to say Pentalogic's Reminder is one of the best I've seen."* states W.P.

Of course, all this logic is easily changed using the standard SharePoint Web Part editing interface. Nothing new to learn, you just use what you know. A new release of the Reminder web part now includes a rich text editor for modifying the email message. So you can enhance the custom emails even more than previous.

"This was a feature critical to a successful system. Because of Pentalogic's Reminder web part, we're able to keep the entire team informed of new changes and requirements. Staff are sent alerts on critical deadlines and follow-up on completed projects can easily be done. In fact, if we wanted to, we could even send a note back to the original requestor telling them when a project has been completed. Currently we're managing hundreds of projects with the SharePoint site."

"A complete knowledge base (wiki) is included, along with all documentation for the department. The business is starting to grow; and knowing we have a tool to stay on top of our clients work is one less headache to worry about."

W.P.
Director of Practice Support at ACME

About "ACME":

Beginning as a leading defense firm for automotive product liability cases, ACME has become a nationally recognized trial firm that defends household name clients in widely publicized catastrophic injury and wrongful death verdicts, and other complex litigation. Today, ACME provides a well established array of complementary core practice groups to its national product liability defense practice, including intellectual property litigation, construction litigation, consumer warranty litigation, as well as business and commercial litigation. The firm has offices throughout the US.

For more information, please visit
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